

Strategic Plan Summary

The Olmsted County Historical Society (OCHS) operates two national register properties, two other historic buildings, and a 22,000 square foot interpretive center. This array of facilities and associated operations and programming makes prioritizing management issues difficult. As a result, in 1999, the OCHS Board of Directors began a campaign to update and produce technical documents with consultants to help define and rank goals. Recent technical documents completed for OCHS include:

- 2000 Mayowood Historic Structure Report;
- 2001 Mayowood Business Plan;
- 2002 Stoppel Farmstead Historic Structure Report;
- 2002 Mayowood Cultural Landscape Report.

In 2001, a field representative for the Upper Midwest Conservation Association prepared a general conservation assessment survey of collections held by OCHS and a subsequent storage assessment survey the following year. These documents prompted the Board of Directors to require an inclusive plan to guide the operations and development of the institution. The task of preparing the strategic long-range plan was placed in the hands of the OCHS Development Committee.

Since the institution's previous strategic long-range plan was outdated and minimal, committee members decided to develop a new plan. Following this decision, committee members contacted staff from the Upper Midwest Conservation Association and the Minnesota Historical Society for suggestions regarding effective long-range planning tools. The OCHS Development Committee utilized sample long-range plans and the above referenced technical documents to create the framework of the institution's strategic long-range plan. OCHS staff, community members, and Board of Directors advised the Development Committee, as well as reviewed and edited many versions of the plan. On September 26, 2002, the Board of Directors adopted the OCHS Strategic Long-Range Plan.

With the completion of the 2002 OCHS Strategic Long-Range Plan and the 2001 OCHS General Conservation Assessment Survey Report, the Field Service Director of the Upper Midwest Conservation Association recommended that OCHS needed a preservation plan to prioritize collection issues. In 2002, OCHS received a grant from the National Endowment for the Humanities to hire Neil Cockerline from the Upper Midwest Conservation Association to mentor the OCHS staff in preparing a preservation plan. The recommendations presented in the OCHS General Conservation Assessment Survey Report served as the foundation for the preservation plan. The OCHS Preservation Plan includes a summary of collection needs, prioritized actions to meet the needs, and funding requirements. The plan also contains a five-year timetable associated with the action plan and preservation actions to date.

In September of 2004, based upon the predetermined review schedule and the addition of new technical studies such as the 2003 OCHS Preservation Plan and the 2003 Mayowood Gardens Interpretation and Circulation Plan, staff began updating the OCHS Strategic Long-Range Plan with assistance from the OCHS Board of Directors. This new plan, which is pending OCHS Board approval, provides the guidelines for managing operations, measuring accomplishments, and informing the public of OCHS's objectives.

The OCHS Strategic Long-Range Plan identifies an approach to dealing with the institution's six key issues including; Collections and Facilities, Education, Resource Center, Marketing, Governance and Operations, and Finances. Goals associated with the key issues have been identified, as well as action steps to achieve each goal. The technical studies serve as components to the plan. To facilitate plan success, OCHS needs to:

- set and follow a review schedule;
- solicit planning input from the community;

- assess and review plan with recommendations from other OCHS technical studies;
- incorporate the actions steps into operational planning;
- use the measurable action steps to evaluate the plan.

OCHS has established an evaluation process for internal, working documents such as the OCHS Strategic Long-Range Plan. The staff, community members, and the Development Committee review the plan every two years. Then, changes are discussed and the documents are updated to reflect the consensus. Modifications are presented to the Board of Directors for discussion. The Board of Directors is required to adopt updated plans with a majority vote before it is put into use.

In addition to this internal review process, OCHS is continually working with consultants to assist with assessments. In 2003, OCHS applied for and received a MAP grant to fund an institutional assessment. This assessment will be completed in 2005. In 2003, OCHS also received a \$10,000 grant from the Statewide Audience Development Initiative managed by the Minnesota State Arts Board. As a result, the OCHS Educator worked with an area-consulting firm to complete a participation-building assessment for the 2004 *Hands-On-History Days*. In an effort to reach an underserved group, the project focuses on diversifying the audience by generating interest for the event among teenagers. Due to findings from the assessment, OCHS worked with a group of advisory teenagers to plan, market, and implement teen-focused activities for *Hands-On-History Days*. Over 150 teenagers enjoyed the activities planned by their peers. This success proves the value of community input to expand audiences and improve programming.

Many accomplishments can be attributed to the thorough planning conducted by OCHS. Since undertaking a variety of planning activities in 2001, technical studies have helped secure the following:

- OCHS raised \$50,000 to replace the roof on the Stoppel Farmstead
- OCHS raised \$325,000 for the installation of a geo-thermal heating, ventilating, and air conditioning system at the History Center to improve humidity and temperature levels.
- OCHS raised \$500,000 for the replacement of the roof at the Mayowood Mansion.
- OCHS received a \$5,000 NEH grant to support the production of a storage assessment survey and a preservation plan
- OCHS raised \$28,000, including a grant from the Minnesota Historical Society, to hire a mason to restore the Stoppel Farmhouse entrances and cave.
- OCHS received a \$5,000 NEH grant to rehouse the Cutshall Collection into archivally stable containers
- OCHS received \$6,000 grant from the Minnesota Historical Society to restore the windows and doors on the Stoppel Farmhouse.

In addition to these projects, OCHS has also applied for funding to install compact storage units into the textile storage room based upon recommendations in the storage assessment report produced by the Upper Midwest Conservation Association. Both the successful projects and the ongoing planning and submission of grant applications, demonstrate OCHS's commitment to meeting its planning goals.

1. PROJECT DESIGN

The Olmsted County Historical Society (OCHS), a non-profit 501 (c) (3) institution in Rochester, Minnesota, is the leading heritage resource center in the area. OCHS is submitting this application to request funding to support the production of a Comprehensive Interpretive Plan. Due to the number and size of OCHS's facilities, as well as the volume and significance of its collection, it is imperative that the organization develops a Comprehensive Interpretive Plan to define and prioritize interpretive programs. The Comprehensive Interpretive Plan will include a statement of significance, primary site-wide themes, audience categories, long-range vision of programming, and implementation summaries (Individual Service Plans) with action steps. This planning process will identify programs--the various services to deliver interpretation such as exhibits, trails, brochures, etc.--that most effectively use OCHS's resources to interpret the primary site-wide themes.

OCHS has spent the past six years successfully preparing technical documents with consultants--such as historic structure reports, a general conservation assessment report, a cultural landscape report, and a preservation plan--to guarantee that the organization's historical resources are properly maintained, conserved, preserved, and restored. With a sound infrastructure, OCHS is focusing its attention on interpretive programs and visitor experiences. The project design for the development of a Comprehensive Interpretive Plan provides a detailed description of OCHS's resources and programs to justify the need for inclusive planning, an outline of project methodology based upon National Park Service standards, a clear list of objectives, and an evaluations system. The development of a Comprehensive Interpretive Plan will provide OCHS with a management tool, which takes account of all of its programs, facilities, and other resources. The plan will help the institution create and improve interpretive programs, thereby, appealing to broader audiences and making personal connections between visitors and its resources. The resources listed below will be brought into the planning process.

OCHS Resources & Programs

The development of a Comprehensive Interpretive Plan will allow OCHS to better manage its varied programs, facilities, and collections. OCHS owns forty-five acres comprising the Olmsted County History Center (History Center) grounds and an additional fourteen acres of the Mayowood Estate. The History Center grounds include:

- The 1973 History Center, a 22,000 square feet accessible building, houses an extensive collection, exhibit hall, education area, Willson Library/ Wicklund Archives, meeting room and gift shop. It is open five days a week from 9:00 a.m. to 5:00 p.m.
- The ca. 1860s George Stoppel Farmstead, a National Register complex featuring a limestone house, backhouse, rock-dug-cave, and "basement" barn, is open for special tours and activities.
- The Ralph Stoppel Farm outbuildings are used to house and interpret motorized, historic farming equipment for special activities.
- The 1885 Hadley Valley Schoolhouse, a one-room building, is used for curriculum-based school tours, self-guided tours, and special events.
- The 1862 Dee Log Cabin is used for curriculum-based school tours, self-guided tours, and special events.
- The military museum building--under construction--will interpret military history related to Olmsted County.
- Schmitt Field, used for demonstration baseball games, helps interpret the early years of the sport.
- The heritage garden is used for curriculum-based school tours and special events.
- Fifteen acres under cultivation is used to interpret crop harvesting for special events.

The Mayowood Complex includes:

- The 1910-1911 Mayowood Mansion, part of a National Register District, displays Prairie School, Neo-Classical, and Mediterranean architectural elements. The 38-room Mansion exhibits a wide array of original furnishings owned by Dr. Charles Horace Mayo, cofounder of the internationally famous Mayo Clinic, and his family. The Mansion hosts seasonal tours and special events.
- The Mayowood Historic Landscape includes the Upper House Garden and the Middle Slope Pool Garden and is used seasonally for tours and special events. Prominent features of the nationally significant gardens include the pergola, teahouse, "dragon tooth" limestone walls lining the drive, a brick-paved back terrace with a central oak tree, a graduated system of seven ponds, a tempietto, a pergola, various statues and sculptures, and a system of concrete and stone steps and walkways.

In addition to these buildings, structures, and planned landscapes, OCHS owns items that have local, national, and international significance. The OCHS collection helps interpret the cultural heritage of Olmsted County residents from the 1850s to the present. Olmsted County is the birthplace of the internationally famous Mayo Clinic, and OCHS is fortunate to have a variety of items from their medical practice and from several generations of Mayo families. IBM Rochester developed several notable computer systems including the AS/400, one of which is in OCHS's collection. Specific items in the OCHS collection include:

- The History Center's 2,800 square foot storage space holds approximately fifteen metalwork objects and another fifteen transportation vehicles; approximately fifty musical instruments, fifty stone artifacts, and fifty water colors/drawings/prints; approximately 250 archaeology objects, 250 armor/weapons, 250 geology/mineralogy/paleontology objects, and 250 paintings; approximately 750 ceramic/glass objects, approximately 1,500 furniture/wood artifacts/ wood sculptures and 1,500 science/technology/medical objects; approximately 7,500 textiles/costumes; and over 50,000 historic objects.
- The library/archival materials and photographic collections located in the Wicklund Archives each number over 1,000,000 items. The 3,200 square foot Archives holds over 750 sound and film recordings. Popular collections held at the History Center include cemetery records, census, probate and guardianship records, birth, death, and marriage records for counties in southeastern Minnesota, family files, military information, letters, diaries, photographs, newspapers, business files, house and building files, blueprints, maps, etc.

OCHS offers annual educational programming to children and adults. These programs include:

- *Oakwood Cemetery Walk* - This one-day event highlights actors in period costumes portraying historic personalities who helped forge Rochester's history.
- *Mayowood Garden Tour* - This event features guided tours of the nationally significant Mayowood Historic Landscape and off-site private gardens. Visitors explore plantings and architectural features, as well as enjoy gardening demonstrations, retail items, and refreshments.
- *Roosters Vintage Base Ball* - These summer games feature baseball played in period uniforms with replica bats and balls and follows the 1860 rule book.
- *Days of Yesteryear at the History Center* - This annual event focuses on historic mechanical equipment and farming practices.
- *Hands-on-History Days* - This event focuses on historical reenactments depicting area history from the mid 19th to the mid 20th centuries. Period-dressed performers educate children and adults with twenty-five minute interactive, hands-on demonstrations.
- *Mayowood Christmas Tours* - Visitors tour the festively decorated mansion to learn about one of the co-founders of the Mayo Clinic--Dr Charles H. Mayo. Decorators, who serve as the heart of the event, provide merchandise, collections, and much effort to design the interior rooms and trim the mansion's façade.
- *Murder at Mayowood* - This evening event allows visitors to step back in time and help solve a murder mystery with period dressed actors in the historic setting of the mansion.
- *Princess Café Lecture Series & Yaggy Colby Lecture Series* - These monthly lectures highlight historical topics associated with our region, and welcome an exchange of different remembrances and perspectives on local history.
- *2nd Grade Program* - This curriculum-based program invites students to learn about area immigration, transportation and early settlement at the History Center. The presentation includes exhibit tours and hands-on activities such as planting a heritage garden.
- *3rd Grade Program* - This curriculum-based program invites students to explore the topic of settlement with museum tours and visits to the Dee Log Cabin and hands-on Hadley Valley Schoolhouse.
- *6th Grade Program* - While learning about Minnesota History, students take a closer look at Rochester's development with a curriculum-based tour of the Mayowood Mansion.

Project Methodology

The project methodology associated with developing a Comprehensive Interpretive Plan for OCHS involves three phases. Phase one includes an initial meeting between CIP Coordinator Mary Gorfine, CIP Specialist Erik Holland, and OCHS staff to identify desired stakeholders. Potential stakeholders may include public and private school teachers, school administrators, partners from local businesses such as IBM and the Mayo Clinic, Diversity Council members, OCHS docents, Elder Hostel coordinators, Minnesota Historical Society staff, Olmsted County Youth Commission members, city

and county government officials, community education staff, University Center Rochester instructors, and scout leaders. CIP Coordinator Gorfine will then recruit between twenty-five and thirty stakeholders to participate in the two-day planning process. CIP Coordinator Gorfine will work with CIP Specialist Holland to compile and distribute informational packets to stakeholders, as well as organize meeting details such as hand-outs, name tags, lunches and refreshments, room(s) reservations, seating arrangements, and stakeholder confirmation. During this phase, CIP Specialist Holland will meet with the OCHS Interpretive Team to review planning expectations and workshop presentations about current interpretation methods. The OCHS Interpretive Team will include the OCHS Educator Cheryl Finnegan, OCHS Executive Director John Hunziker, OCHS Curator Margaret Ranweiler, OCHS Volunteer John Heintz, and OCHS Board of Director Jane Yunginger.

Phase two will focus on the stakeholder workshops. The first stakeholder workshop, planned for late January, will be facilitated by CIP Specialist Holland. Following an introduction to the planning process and OCHS's resources, stakeholders will outline interpretive audiences (i.e. general public, education groups, special interests/needs), prepare statements of significance, and draft primary site-wide interpretive themes. The development of primary site-wide themes will make important connections among the varied resources. After the workshop, CIP Specialist Holland will compile the results of the workshop for distribution by the CIP Coordinator Gorfine to the stakeholders prior to the second workshop. In early March, the CIP Specialist Holland will conduct the second stakeholder workshop. Activities during this day will focus on identifying future interpretive programming, visitor experiences, and program value. These workshops will result in the foundation of an OCHS Interpretive Program Matrix, which is a chart organizing a five-year interpretive plan in relation to primary site-wide interpretive themes and interpretive audiences.

In phase three of the project, CIP Specialist Holland will work with the OCHS Interpretive Team, OCHS staff, and CIP Coordinator Gorfine to assess the workshop results and construct the final OCHS Interpretive Program Matrix. During a two-day session, this group will address interpretive programming feasibility within the five-year timeframe. CIP Specialist Holland will then produce the final OCHS Interpretive Program Matrix and a narrative document to compliment the chart. Once the matrix is completed, OCHS staff will prepare Individual Service Plans for implementing interpretive programs identified for 2006. Each Individual Service Plan--a one-page document--will include an overview of the program, goals, evaluation process, audience, staff needs, materials, staffing, schedule, and budget. The final OCHS Comprehensive Interpretive Plan will consist of a narrative, matrix, and Individual Service Plans for the 2006 interpretive program, as well as provide input of program planning for the next four years.

Objectives

Since the development of an OCHS Comprehensive Interpretive Plan is a core action step to improving visitor services, interpretation, and educational programs, it has an extensive list of clear objectives including:

- Identify and secure at least twenty-five stakeholders to participate in the planning process
- Develop collaborative partnerships within the community who have a stake in the plan
- Develop at least four primary site-wide interpretive themes with strong connections to both OCHS's materials culture and mission statement
- Establish a five-year timeline with achievable, prioritized action steps for interpretive activities
- Expand audiences
- Make strong intellectual and emotional connections for visitors through effective interpretive methods
- Identify and analyze separate interpretive action steps for different audiences
- Improve visitors' understanding about Olmsted County history
- Improve curriculum-based and general public educational programming
- Increase public access to OCHS's resources
- Increase public awareness of OCHS's resources
- Build a dynamic interpretive plan that uses visitor input

Evaluation

Success of the plan will be assessed based upon the measurable objectives. Quantitative measurements for the OCHS Comprehensive Interpretive Plan will include:

- Variety of professional backgrounds of stakeholders who participate in the workshops
- Number of stakeholders who participate in the workshops

- Inclusiveness and number of primary site-wide interpretive themes developed for OCHS
- Completed OCHS Interpretive Matrix with a five-year timeline and narrative
- Completed Individual Service Plans for 2006 interpretive programs
- Number of people who visit interpretive programs
- Variety of age groups who visit interpretive programs
- Variety of ethnic backgrounds of visitors who interact with the interpretive programs
- Variety of special interest visitors who interact with interpretive programs
- Variety of special needs visitors who interact with interpretive programs

The qualitative measurements for the plan's success will be analyzed through visitor evaluations. Program evaluations will be used to gain knowledge on visitor enjoyment and understanding. In the end, OCHS hopes to create a dynamic plan that provides new opportunities and guarantees a high quality interpretive experience for visitors. Moreover, the resulting interpretive programs will promote the value of the area's cultural heritage and the need to preserve its resources.

2. GRANT PROGRAM GOALS

Through the OCHS Comprehensive Interpretive Plan, the institution will better sustain the rich cultural heritage of Rochester and Olmsted County, whose legacy is tied to innovations and practices of the internationally recognized Mayo Clinic, technology used by the world leader IBM, and the locally significant subjects of settlement, farming, commerce, immigration, etc. As a cultural heritage resource center, OCHS understands its role as a distinctive learning institution and places a high priority on providing effective services and programs. The OCHS Comprehensive Interpretive Plan will function as a primary tool in developing and evaluating better services and programs. The OCHS Comprehensive Interpretive Plan will help OCHS enlarge its audiences, create informative and enjoyable cultural heritage programs, make personal connections between visitors and the institution's resources, continually incorporate visitor input, and inform the community about the value of preserving its heritage. These activities will heighten the impact of Olmsted County's material culture on visitors. Thereby, utilizing cultural heritage and interpretation to strengthening the social well-being of the community.

3. HOW THE PROJECT FITS INTO STRATEGIC PLAN AND MISSION

The institutional planning documents and philosophy adopted by OCHS's governing body support and place priority on the development of an OCHS Comprehensive Interpretive Plan. OCHS's mission reads: *To inspire and serve the public as the leading historical institution in Olmsted County and the region by connecting the past with the future.* The main goals of our institution are to: collect and preserve objects and documents associated with the area's history; serve as a historic resource center; maintain/preserve both the historic and modern facilities owned by OCHS; provide educational programs; and increase membership, volunteerism, and community partnerships. The OCHS Comprehensive Interpretive Plan will allow the historical institution to better serve the public by reaching a broader audience, establishing better personal connections between generations, utilizing resources more effectively for interpretation, and highlighting the intrinsic value and need to preserve resources.

The 2004 OCHS Strategic Long-Range Plan lists the development of an interpretive plan as an institutional priority action step. The OCHS Comprehensive Interpretive Plan will serve as a tool to accomplish other action steps identified in the OCHS Strategic Long-Range Plan as well. Action steps associated with exhibits, collection use, collection access, curriculum and general public programs, off-site programming, community partnerships, audience participation assessments, program underwriter opportunities, grant activities, and accreditation will all be enhanced by an OCHS Comprehensive Interpretive Plan. The management tools will function together to provide the institution with effective planning and implementation guidance.

Specifically, the OCHS Comprehensive Interpretive Plan will allow the institution to combine its resources, community partnerships, staff, and volunteers to provided better interpretive programs. The matrix, which extends over a five-year timeline, will serve as an important, easy to follow tool for informing community members about the route of OCHS's interpretive planning. With direction from the Individual Service Plans, the institution will be able to focus on implementing specific action steps to achieve its long-term interpretive objectives.

4. STRATEGIC PLAN: PROCESS AND FINANCIAL RESOURCES

In 1999, with a change in leadership, OCHS began raising money and hiring consultants to produce assessments of the resources maintained by the institution. As a result, consultants worked with staff, Board of Directors, volunteers, and community members to produce the following management documents: 2000 Mayowood Historic Structure Report; 2001 OCHS General Conservation Assessment Survey Report; 2001 Mayowood Business Plan; 2002 Mayowood Task Force Report; 2002 Stoppel Farmstead Historic Structure Report, and 2002 Mayowood Cultural Landscape Report. These documents and an outdated long-range plan prompted the Board of Directors to require an inclusive plan to guide the operations and development of the institution.

The task of preparing the strategic long-range plan was placed in the hands of the OCHS Development Committee, who consulted the Upper Midwest Conservation Association, the Minnesota Historical Society, staff, Board of Directors, volunteers, and community members. This information gathering process served as a vital component of the plan to analyze services provided to the region, as well as community support for projects and programs. On September 26, 2002, after reviewing and commenting on several drafts, the Board of Directors adopted the OCHS Strategic Long-Range Plan. Due to the predetermined review schedule and completion of additional management documents such as the 2003 OCHS Preservation Plan and the 2003 Mayowood Gardens Interpretation and Circulation Plan, OCHS staff updated the OCHS Strategic Long-Range Plan in September of 2004. This document has been presented to the OCHS Development Committee and is pending Board approval. In addition to reviewing its planning documents, OCHS is continually generating new management documents. For example, in 2003, OCHS applied for and received a MAP grant to fund an institutional assessment in 2004. This process is underway and will be completed in 2005.

Over the past five years, these planning documents leveraged financial support to achieve institutional priorities outlined by OCHS and its consultants. The institution has found that funders are willing to support activities that have been extensively planned. Between 1999 and 2000, OCHS raised \$250,000 to have the roof replaced and a fire suppression system installed at the History Center. In 2001 and 2002, OCHS raised \$325,000 to have a geo-thermal heating, ventilating, and air conditioning system installed at the History Center to improve humidity and temperature levels. OCHS raised \$500,000 for the replacement of the roof at the Mayowood Mansion in a two-year period from 2001 to 2003. These are only a few examples of the large infrastructure projects the institution has undertaken with area business and foundation support. With the completion of these large-scale projects, OCHS can focus its attention on providing effective interpretive programs to broader audiences.

Successful planning and completion of projects by OCHS resulted in an increase of community awareness and support in money, professional guidance, and labor. Between 1999 and 2004, OCHS raised over one and one-half million dollars for educational programs, capital improvement and restoration projects, exhibits, new technology and equipment, collection preservation activities, etc. OCHS also added over 250 new community partners to its support group. These contributions lay the foundation for future financial success and validate the importance of our institution in the community, thereby generating substantial financial support from both the City of Rochester and Olmsted County. Over the past six years, Olmsted County has allocated over one million dollars to operations and the City of Rochester has contributed \$275,000 to special projects. This community wide support shows the importance of and confidence in OCHS as a cultural heritage institution in the area.

5. APPROPRIATENESS OF PROJECT FOR INSTITUTION, AUDIENCE

The methodology selected to prepare the OCHS Comprehensive Interpretive Plan has been designed to allow the institution to better serve both residents and visitors to the area. The History Center, owned by OCHS, is in southwest Rochester--a city with a population of 82,019 (2000). The city, which originally was formed as a farming center, significantly grew as a result of the international prominence of its two largest employers--the Mayo Clinic and IBM. The Mayo Clinic brings approximately one million people to the city annually. Olmsted County boasts 124,277 (2000) people and ranks eighth in Minnesota's population statistics. Nearly eight percent of Olmsted County's residents are foreign born with approximately 44% from Asia, 20% from Africa, 19% from Europe and 12% from Latin America. With the growing ethnic diversity in Olmsted County, as well as the variety of languages spoken by visitors to Rochester and its residents, OCHS needs to address these changes in its long-term planning. Since OCHS's institutional plan focuses on serving all people in the region, stakeholders representing this diversity would be recruited to participate in the Comprehensive Interpretive Planning process.

OCHS, a community focused institution, actively serves as a unique regional resource center by offering a varied presentation of educational programs, special historical events, exhibits, research library, and archives to all people living in and visiting Olmsted County. OCHS's fine facilities provide area groups and businesses with a site to conduct research, meetings, and programs as well. It is the only county institution, which actively collects, preserves, and displays artifacts associated with the cultural heritage of the area. In 2003 alone, approximately 30,000 individuals visited OCHS's properties. OCHS is committed to area education and has designed programs to meet curriculum requirements for local schools. Over 6,000 students attend our programs annually. The library/archives is a regional research center and provides service to over 5,000 patrons onsite or through mail/e-mail orders. This figure does not include people who use OCHS's online databases.

Even though OCHS has strong visitor numbers, the institution wants to provide more effective interpretive programs to the community. In 2003/2004, OCHS received a \$10,000 grant from the Statewide Audience Development Initiative managed by the Minnesota State Arts Board. As a result, the OCHS Educator Cheryl Finnegan worked with an area-consulting firm to complete a participation-building assessment for the 2004 *Hands-On-History Days*. In an effort to reach an underserved group, the project focuses on diversifying the audience by generating interest for the event among teenagers. Due to findings from the assessment, Finnegan and Gorfine worked with a group of advisory teenagers to plan, market, and implement teen-focused activities for *Hands-On-History Days*. As opposed to previous years when no more than five teens participated in the event, over 150 teenagers enjoyed the activities resulting in a 3,000 percent increase. This success proves the value of community input to expand audiences and improve programming. This activity provides an example of how strategic planning of interpretive programming can support OCHS's changing audiences.

6. PROJECT RESOURCES: TIME AND BUDGET

The project budget and timeline have been established based upon a 12-month period. The three phase project will include: the initial four months scheduled to accommodate recruiting stakeholders for the planning process, preparing stakeholder packets, and planning the workshops; the middle four months to conduct the workshops for gathering information from stakeholders and preparing a preliminary matrix and narrative; the final four months to assess the feasibility of the recommendations, prepare a final matrix and narrative, and prepare Individual Service Plans.

The majority of the budget for this project is in labor. Wages, hours, and other expenses for consultants CIP Specialist Holland and CIP Coordinator were based upon rates addressed in their letters of commitment. Due to the involvement of outside consultants, this project will not interfere with OCHS programming and staff responsibilities. Calculations for staff were based upon current wages and volunteer rates were based upon Rochester's usual and prevailing wage of \$10.00 per hour. The honorarium is a reasonable fee to compensate stakeholders for their time commitment at the workshops. The expenses for supplies, mailings, and workshop lunches, and refreshments were based upon current rates. Over the last four years, OCHS has managed approximately ten grants annually. During this period, OCHS has administered and completed all of its awarded grants to the specifications of the grantors. This history, along with the knowledgeable staff, proven methodology, and institution-wide priority of developing an OCHS Comprehensive Interpretive Plan, ensures the success the project.

7. PROJECT RESOURCES: PERSONNEL AND TECHNOLOGY

Erik Holland, the CIP Specialist, has been involved with interpretive programs for nearly 30 years. He has creatively planned, developed, publicized, trained, supervised, and presented hundreds of programs for state, federal and tribal agencies and organizations. His long engagement in interpretive and educational programming coupled with his extensive experience participating in and conducting interpretive planning workshops will position Olmstead County Historical Society's Comprehensive Interpretive Planning effort in the forefront of local historical societies by providing direction, insight and stakeholder excitement for years to come.

Mary Gorfine, CIP Coordinator, has a strong background working with a broad range of projects involving area business groups, non-profit organizations, local government, and educational institutions. Gorfine's paid and unpaid work in the community has given her a good understanding of the issues affecting a broad cross-section of residents, and she is as comfortable speaking with community leaders and agency professionals, as she is with new Americans whose English may be limited. Gorfine's work on the 21st Century Partnership long range community planning project, the Olmsted County Family Action Collaborative, and the Olmsted County Youth Commission require a good working relationship with the leadership in all Olmsted County school districts including Rochester Community and Technical College.

Gorfine is currently a member of the Rochester Public Schools Curriculum Advisory Council, as well as the Integration Committee. Both groups include teachers, school district administrators, and community members whose mission is to study public school curriculum and policy issues in order to improve the academic success of K-12 students. This community experience makes Gorfine an excellent person to secure stakeholders and coordinate the project.

Cheryl Finnegan, the OCHS Educator, will serve as the CIP Project Director. Finnegan has a Bachelor of Science Degree with honors in Home Economics/Retailing from the Ohio State University. Finnegan's vast background includes sales, school administration, computer operation, theatre production, community education teacher/speaker, and journalism. In 2000, Finnegan became the Educator/Volunteer Coordinator for the Goodhue County Historical Society. Her accomplishments include developing a multicultural day camp, creating barn bus tours, organizing a costume designers' conference and exhibit, increasing participation and demonstrations for *Hands on History Days*, and organizing the Upper Midwest Regional Association of Museum Educators. At the end of 2002, OCHS hired Finnegan as the Educator. Her current responsibilities include administering educational programs for all ages, coordinating volunteer activities related to education, publicizing programs, administering grants, expanding and developing programs.

John Hunziker, Executive Director, will participate in all facets of the process to produce an OCHS Comprehensive Interpretive Plan. He has an extensive background in education, community government, civic volunteerism, and institutional planning and has been instrumental in OCHS securing over \$1,500,000 in the past four years. Between 1986 and 1994, Hunziker served as a Rochester City Councilperson for the Fourth Ward. In 1994, Hunziker was elected Rochester City Council President and subsequently re-elected to that position until 2004. Hunziker also serves on a number of boards such as the Rochester Public Utility, Greater Rochester Area University Center (GRAUC), Rochester Airport Commission, Rochester Public Library Foundation, Rochester Area Economic Development Inc.(RAEDI), and Rochester Convention and Visitors Bureau. Prior to serving as the OCHS Executive Director, Hunziker taught sixth grade at St. Pius X from 1970 to 2000.

Margaret Ranweiler, OCHS Curator, will serve on the OCHS Interpretive Team. Ranweiler holds a Bachelor of Arts Degree in History from the College of St. Catherine with an emphasis in museum work. Ranweiler completed two internships in the summers of 2000 and 2001. While working at the Phoenix Museum of History and OCHS, Ranweiler worked in the area of general collections management. In January of 2002, Ranweiler became the OCHS Curator of Collections. Her responsibilities include: exhibit research, design, and construction; collection care and preservation; artifact registration; department budget preparation and administration; and volunteer supervision.

Jane Yunginger, an OCHS Board of Director and volunteer, will serve on the OCHS Interpretive Team. Over seven years ago, Yunginger began serving as an OCHS Board Director. She is currently the chairperson of the Nominating and Board Education Committee, as well as a member of the Executive Committee. Other responsibilities include chairing the annual Mayowood Garden Tours. Yunginger has been a driving force in researching, conducting a landscape survey, educating, and securing funds for the restoration of the Mayowood Historic Landscape. In 1999, Yunginger began working on the project to conserve textiles at the History Center.

John Heintz, an OCHS volunteer, will serve on the OCHS Interpretive Team. Heintz has been a volunteer at the History Center since 2000 and he donates approximately 20 hours weekly. Volunteer responsibilities include: serving as a docent for the History Center gallery, Dee Log Cabin, and Hadley Valley Schoolhouse for school programs; guiding visitors at Mayowood Mansion tours; maintaining the bookstore; maintaining the exhibit gallery, reinstalling surgery exhibit following the roof replacement; assisting with the preparation of the hospital room exhibit; and processing mailings. Heintz is also a member of the Development Committee.

Beth Butterfield, OCHS Development Coordinator, will work with staff to prepare the Individual Service Plans. Butterfield has a Master's Degree in Public History. After graduate school, Butterfield worked for five years in the field of Historic Preservation completing Historic Building Surveys, National Register Nominations, Determination of Eligibility Documents, and a Historic American Building Survey in the states of Wisconsin, Nebraska, South Dakota, and Montana. In 1998, Butterfield began grant writing for youth programs at Rochester Community and Technical College. In 1999, she started working for OCHS in the areas of program and project planning, grant writing, and fundraising.

Project Budget Form

SECTION 1: SUMMARY BUDGET

Name of Applicant Organization Olmsted County Historical Society

IMPORTANT! READ INSTRUCTIONS ON PAGES 3.4-3.5 BEFORE PROCEEDING.

DIRECT COSTS

	IMLS	Applicant	Total
SALARIES & WAGES	<u>\$10,035</u>	<u>\$10,889</u>	<u>\$20924</u>
FRINGE BENEFITS	<u></u>	<u>442</u>	<u>442</u>
CONSULTANT FEES	<u>\$ 4,250</u>	<u></u>	<u>4250</u>
TRAVEL	<u>746</u>	<u></u>	<u>746</u>
MATERIALS, SUPPLIES & EQUIPMENT	<u></u>	<u>850</u>	<u>850</u>
SERVICES	<u></u>	<u></u>	<u></u>
OTHER	<u></u>	<u>2,850</u>	<u>2850</u>
TOTAL DIRECT COSTS	\$ <u>15031</u>	\$ <u>15,031</u>	\$ <u>30062</u>
INDIRECT COSTS	\$ <u></u>	\$ <u></u>	\$ <u></u>

TOTAL PROJECT COSTS \$ 30062

AMOUNT OF CASH MATCH \$ 5415

AMOUNT OF IN-KIND CONTRIBUTIONS \$ 9616

TOTAL AMOUNT OF MATCH (CASH & IN-KIND CONTRIBUTIONS) \$ 15031

AMOUNT REQUESTED FROM IMLS, INCLUDING INDIRECT COSTS \$ 15031

PERCENTAGE OF TOTAL PROJECT COSTS REQUESTED FROM IMLS 50 %
(MAY NOT EXCEED 50%)

Have you received or requested funds for any of these project activities from another federal agency?
(Please check one) ☐ Yes ☒ No

If yes, name of agency _____

Request/Award amount _____

Project Budget Form

SECTION 2: DETAILED BUDGET

Year ☒ 1 ☐ 2 ☐ 3 - Budget Period from 09 / 01 / 2005 to 08 / 31 / 2006

Name of Applicant Organization Olmsted County Historical Society

IMPORTANT! READ INSTRUCTIONS ON PAGES 3.4-3.5 BEFORE PROCEEDING.

SALARIES AND WAGES (PERMANENT STAFF)

NAME/TITLE	No.	METHOD OF COST COMPUTATION	IMLS	APPLICANT	TOTAL
[REDACTED]		50 hrs		1565	1565
[REDACTED]		75 hrs		1165	1165
[REDACTED]		50 hrs		631	631
[REDACTED]		50 hrs		875	875
[REDACTED]		10 hrs		188	188
TOTAL SALARIES AND WAGES \$				4424	4424

SALARIES AND WAGES (TEMPORARY STAFF HIRED FOR PROJECT)

NAME/TITLE	No.	METHOD OF COST COMPUTATION	IMLS	APPLICANT	TOTAL
Seminar Participants (30)		\$150/day honorarium	7500	1500	9000
[REDACTED]		260 hours @ \$25/hr	2535	3965	6500
[REDACTED]		50 hours @ 10/hr		500	500
[REDACTED]		50 hrs @ 10/hr		500	500
TOTAL SALARIES AND WAGES \$			10035	6465	16500

FRINGE BENEFITS

RATE		SALARY BASE	IMLS	APPLICANT	TOTAL
10	% of \$	4424		442	442
	% of \$				
	% of \$				
TOTAL FRINGE BENEFITS \$				442	442

CONSULTANT FEES

NAME/TITLE OF CONSULTANT	RATE OF COMPENSATION (DAILY OR HOURLY)	No. OF DAYS (OR HOURS) ON PROJECT	IMLS	APPLICANT	TOTAL
[REDACTED]	\$38/hr	40	1520		1520
[REDACTED]	\$30/hr	76	2280		2280
[REDACTED]	\$25/hr	18	450		450
TOTAL CONSULTANT FEES \$			4250		4250

TRAVEL

FROM/TO	NUMBER OF: PERSONS DAYS	SUBSISTENCE COSTS	TRANSPORTATION COSTS	IMLS	APPLICANT	TOTAL
StP to Roch	(1) (6)	411	335	746		746
	() ()					
	() ()					
	() ()					
TOTAL TRAVEL COSTS \$				746		746

Project Budget Form

SECTION 2: DETAILED BUDGET CONTINUED

 Year ☒ 1 ☐ 2 ☐ 3

MATERIALS, SUPPLIES AND EQUIPMENT		IMLS	APPLICANT	TOTAL
ITEM	METHOD OF COST COMPUTATION			
Phone, postage, etc	est.		100	100
Supplies	est.		750	750
TOTAL COST OF MATERIALS, SUPPLIES, & EQUIPMENT \$			850	850

SERVICES		IMLS	APPLICANT	TOTAL
ITEM	METHOD OF COST COMPUTATION			
TOTAL SERVICES COSTS \$				

OTHER		IMLS	APPLICANT	TOTAL
ITEM	METHOD OF COST COMPUTATION			
Room Rental	\$450/day for 5 days		2250	2250
Lunches & Refreshments	\$150/day 4 days		600	600
TOTAL OTHER COSTS \$			2850	2850

TOTAL DIRECT PROJECT COSTS \$	15031	15031	30062
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INDIRECT COSTS

Check either item A or B and complete C. (See section on Indirect Costs, page 3.5.)

Applicant organization is using:

- ☐ A. An indirect cost rate which does not exceed 15 percent of modified total direct costs charged to IMLS.
☐ B. Federally negotiated indirect cost rate (see page 3.5).

Name of Federal Agency Expiration

Date of Agreement

Rate base Amount(s)

_____ % of \$ _____ = \$ _____

IMLS Applicant

Total

C. Total Indirect Costs

\$ _____ \$ _____

\$ _____

BUDGET JUSTIFICATION

The Olmsted County Historical Society has spent six years, contributing money and staff time, to reach a point where it is prepared to undertake the development of a Comprehensive Interpretive Plan. This project is a priority action step identified in the 2004 OCHS Strategic Long-Range Plan. Action steps associated with exhibits, collection use, collection access curriculum and general public programs, off-site programming, community partnerships, audience participation assessments, program underwriter opportunities, grant activities, and accreditation will all be enhanced by an OCHS Comprehensive Interpretive Plan. OCHS has raised hundreds of thousands of dollars making sure its infrastructure, such as the facilities and collections, are being properly preserved, conserved, maintained, and restored. The organization has contracted with consultants to prepare the necessary technical assessment documents to accurately prioritize action steps. This groundwork ensures a quality project with a long-lasting impact.

The funds requested from IMLS include the consultants' labor and expenses identified in the letters of commitment in Attachment B. Erik Holland, the CIP Specialist, has been involved with interpretive programs for nearly 30 years. He has creatively planned, developed, publicized, trained, supervised, and presented hundreds of programs for state, federal and tribal agencies and organizations. CIP Specialist Holland will recommend stakeholders, participate in a meeting regarding content and expectations for workshops, advise the CIP Coordinator on content of information packets, facilitate workshops, participate in meetings with OCHS Interpretive Team, prepare draft matrix and narrative for the OCHS Comprehensive Interpretive Plan, meet with OCHS staff to review feasibility plans, finalize matrix and narrative, and guide OCHS staff in the development of the Individual Service Plans. CIP Specialist Holland will contribute 141 hours to the project totaling \$4,250. His travel expenses will total \$746. CIP Specialist will collaborate with CIP Coordinator and OCHS staff throughout the planning process.

OCHS selected Mary Gorfine as the CIP Coordinator due to her a strong background working with a broad range of projects involving area business groups, non-profit organizations, local government, and educational institutions. Gorfine also worked with OCHS as the For Teens By Teens Coordinator. This position was the result of a \$10,000 SADI grant to reach teenagers --an underserved audience. Gorfine worked with a group of advisory teenagers to plan, market, and implement teen-focused activities for 2004 *Hands-On-History Days*. CIP Coordinator Gorfine will contribute 260 hours to the project at a rate of \$25.00 per hour. Gorfine will recruit and confirm stakeholders, participate in meetings regarding content and expectations for workshops, prepare information packets for stakeholders, make and confirm workshop arrangements, and participate in meetings with the OCHS Interpretive Team. Throughout this process, Gorfine will be in contact with the OCHS staff and CIP Specialist Holland. The fees and expenses for Holland and Gorfine have been determined reasonable based upon previous consulting fees to prepare planning documents for OCHS over the past six years.

OCHS is also requesting 83% of the honorarium funds to support the involvement of community stakeholders to participate in two workshops. OCHS will fund 17% of this budgeted item. OCHS plans to pay thirty stakeholders \$150 a day for two days. This honorarium is based upon past community input sessions. This amount can also be used for schools to pay substitutes and give teachers leave to attend the workshops. In addition to public and private school teachers and administrators, the honorarium will compensate the valuable time of potential stakeholders such as partners from local businesses (i.e. Mayo Clinic and IBM), Diversity Council members, OCHS docents, Elder Hostel coordinators, Minnesota Historical Society staff, Olmsted County Youth Commission members, city and county government officials, community education staff, University Center Rochester instructors, and scout leaders. Since the foundation of this project is the involvement of community stakeholder, the honorarium funds are crucial to the development of a Comprehensive Interpretive Plan.

The matching funds contributed by OCHS will include staff wages and in-kind volunteer hours. Calculations for staff were based upon current wages. Cheryl Finnegan, the OCHS Educator, will serve